

CHANGE: MIGRATING 1040 TO THE MEF PLATFORM



MARCH 3, 2009



Transition Concerns



- Volume Management Plan
- Acknowledgement Turnaround Time



Volume Management Plan Notes





Acknowledgement Turnaround Time Notes





System Concerns



- Gateway and Strong Authentication Status
- Process for self-transmitting for load test



Gateway and Strong Authentication Status Notes





Process for self-transmitting for load test Notes





Schema Concerns



- Schemas – Status of Package
- ELF Field Numbers
- Schema Review Process
- Schema Versioning
- Parser Change (JAXP) - maxOccurs



Schemas – Status of Package Notes





ELF Field Numbers

How long are the ELF Field Numbers in the MeF schema needed?

The ELF Field Number was included in MeF schemas to provide a cross-walk between the ELF Record Layouts and the MeF schemas. Once you are able to track the ELF Field Numbers to the elements in the initial MeF schema, is it necessary to update the ELF Field Number on subsequent MeF schema versions?



Schema Review Process Notes





Schema Versioning Notes





Parser Change - (JAXP) maxOccurs

- **In order to increase efficiency of the parser when processing MeF returns:**
 - Any repeating group (or dependency, form, schedule, or attachment) that previously had a maxOccurs of > 100 , will now be changed to Unbounded
 - Any repeating group (or dependency, form, schedule, or attachment) that previously had a maxOccurs of ≤ 100 will remain unchanged



Parser Change - (JAXP) maxOccurs

- This change will be implemented for Processing Year 2010 (Tax Year 2009). From TY 09 forward it will be the standard - maxOccurs will either be less than or equal to 100, or Unbounded.
- This will be a minor version schema change for BMF MeF TY 2007 and TY2008 and should be implemented in July 2009
- We are also going to limit the use of LongExplanationType.

Assurance Test System (ATS)





ATS (Assurance Testing System)

- All 22 forms will be tested
 - 5 Test Scenarios for Form 1040
 - 2 Test Scenarios for Form 4868
- Scenario format will be completed forms (See 1st 3 scenarios in Pub 1436 for TY 2008)
- Test Publication will be 1436 (same as Legacy). Legacy info will be in 1st half of Pub and MeF info will be in 2nd half of Pub 1436.
- Pub 1436 scheduled to post to irs.gov 30 days prior to ATS opening



ATS (Assurance Testing System)

- We are trying to determine if we can open ATS earlier than November 2, 2009. If it's possible, options to consider might be:
 - Open ATS early using TY2008 schemas. Re-testing would be required when TY2009 schemas are ready
 - Open ATS when TY 2009 schemas are available but prior to 1040 legacy
- Some issues we are looking at:
 - When will TY2009 form updates be available?
 - Is there enough time to develop all requirements for an early ATS opening?
 - Coordinating MeF IMF and BMF ATS startup dates



State Return Testing

- Does the following meet your needs for testing state returns through ATS:

MeF will assign the same SSNs for State returns in ATS testing as Legacy does for PATS testing.

The same range of SSNs for federal returns will be used in ATS and PATS (400-00-1001 through 400-00-1038). Both sets of SSNs are found in Publication 1436.

E-File Application Changes





MeF e-File Application

- **For new 1040 filers, make sure to select the transmission method of MeF Internet, XML.**
- **If the appropriate box is not checked, the return will reject for business rule R0000-905. (Electronic Filing Identification Number (EFIN) in the Return Header must be listed in the e-File database and in accepted status.)**



MeF e-File Application

- If you are new to MeF you must delegate a person or persons within your firm who will transmit for your companies (IFA) or who will maintain your System Enrollment (A2A).
 - Their authorities on the IRS *e-file* Application must show MeF Internet Transmitter (IFA) or MeF System Enroller (A2A).
 - Those delegated individuals must complete the e-Services Registration process to choose the Username and Password that they will use to transmit returns through the Internet (RUP) or access the Automated System Enrollment application.



MeF e-File Application

- *EROs who are participating in the current e-file Legacy system **will not** need to revise their application.*
- *Software Developers and Transmitters **will need** to update their application to indicate participation in the 1040 MeF program.*



MeF e-File Application

- *States that currently participate in MeF **will not** need to revise their application.*

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 ▶ Workforce
 ▶ Items CRM
 ▶ Configuration Modeler CRM
 ▶ Banking
 ▶ Financial Services
 ▶ Correspondence
 ▶ Number Management
 ▶ Set Up CRM
 ▶ Solutions
 ▶ Enterprise Components
 ▶ Worklist

e-file Application Information : Form(s)

Name: WALT DISNEY RA Employer Identification Number(EIN): 20-1113333

You are required to select the return/form type you are planning to e-file.
You must select at least one form type for each provider type.

You can select any of the following actions from the table below:

- Select **Edit** to edit e-File form entries. (The editable entries will appear in the section below.)
- Select **Delete** to delete an e-File form.

Provider Option	For Profit	Form	Transmission Method - Status	Edit	Delete
Reporting Agent	For Profit	94x	Not Applicable	Edit	Delete

'Provider Option (Required): [Software Developer](#)

'For Profit (Required): [For Profit](#)

'Return/Form Type (Required)

- ☐ 1040 - U.S. Individual Income Tax Return
- ☐ 1041 - U.S. Income Tax Return for Estates & Trusts
- ☐ 1065 - U.S. Return of Partnership Income (1065 and 1065-B)
- ☐ 1120 - Corporate Income Tax Return (1120, 1120-F, 1120-S) and Application for Extension to File (7004)
- ☐ 1120POL - U. S. Income Tax Return for Certain Political Organizations
- ☐ 2290 - Heavy Highway Vehicle Use Tax Return
- ☐ 720 - Quarterly Federal Excise Tax Return
- ☐ 8849 - Claim for Refund of Excise Taxes
- ☐ 94x - Annual and Quarterly Employment Tax Returns (940/941/944 - EMS only)
- ☐ 990 - Return of Organization Exempt from Income Tax (990, 990-EZ, 990-N, 990-PF) and Application for Extension to File (8868)
- ☐ ETD - F 56/2350/2688/4868/9465

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You are required to select the return/form type you are planning to e-file.
You must select at least one form type for each provider type.

***Provider Option (Required):** Software Developer

***For Profit (Required):** For Profit

***Return/Form Type (Required)**

☒ 1040 - U.S. Individual Income Tax Return

***Transmission Method/Format (One or More Required):**

[Description](#)

☐ EMS Internet, Proprietary

☐ MeF Internet, XML

☒ 1041 - U.S. Income Tax Return for Estates & Trusts

***Transmission Method/Format (One or More Required):**

[Description](#)

☒ EMS Internet, Proprietary

☒ 1065 - U.S. Return of Partnership Income (1065 and 1065-B)

***Transmission Method/Format (One or More Required):**

[Description](#)

☒ MeF Internet, XML

☒ 1120 - Corporate Income Tax Return (1120, 1120-F, 1120-S) and Application for Extension to File (7004)

***Transmission Method/Format (One or More Required):**

[Description](#)

☒ MeF Internet, XML

☒ 1120POL - U. S. Income Tax Return for Certain Political Organizations

***Transmission Method/Format (One or More Required):**

[Description](#)

☒ MeF Internet, XML

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e-file Application Information : Form(s)

Name: BOMBAY NATIONAL INC MIKE1 Employer Identification Number(EIN): 02-5142001

You are required to select the return/form type you are planning to e-file.
You must select at least one form type for each provider type.

You can select any of the following actions from the table below:

- Select **Edit** to edit e-File form entries. (The editable entries will appear in the section below.)
- Select **Delete** to delete an e-File form.

Provider Option	For Profit	Form	Transmission Method - Status	Edit	Delete
Electronic Return Originator	For Profit	1040	EMS Internet,Proprietary - Test MeF Internet,XML - Test	Edit	Delete
Software Developer	For Profit	1040	EMS Internet,Proprietary - Test MeF Internet,XML - Test	Edit	Delete

***Provider Option (Required):** Software Developer

***For Profit (Required):** For Profit

***Return/Form Type (Required)**

☒ 1040 - U.S. Individual Income Tax Return

***Transmission Method/Format (One or More Required):**

Description	Form Status
<input type="checkbox"/> EMS Internet, Proprietary	Test
<input checked="" type="checkbox"/> MeF Internet, XML	Test

☐ 1041 - U.S. Income Tax Return for Estates & Trusts

☐ 1065 - U.S. Return of Partnership Income (1065 and 1065-B)

☐ 1120 - Corporate Income Tax Return (1120, 1120-F, 1120-S) and Application for Extension to File (7004)

☐ 1120POL - U. S. Income Tax Return for Certain Political Organizations

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Submission ID vs. DCN





Submission ID vs. DCN

- MeF does not use DCN. We use a 20 digit Submission ID which allows the return to be unique. This ID cannot be duplicated in MeF.
- Legacy uses DCN as a matching tool when Form 8453's are sent in without a social security number.



Submission ID vs. DCN

- Beginning January 2010 the Form 8453 will be updated to allow you to place a DCN or Submission ID on the form.
- After 1040 MeF has been fully implemented, Form 8453 will only allow the Submission ID.

QUESTIONS?

